

Retiree Drug Subsidy (RDS)

Application Submission Process Web-Based Training Handout

Module 1: Starting the Application Early and Identifying Key RDS Secure Website User Roles

This handout complements the web-based training course. It identifies the training topics in the module and highlights key points. Print it out or keep it on your computer screen while taking the course. Use the **Your Notes** column to enter additional information you might want to remember.

Training Topics	Key Points	Your Notes
Requirements to qualify as a Plan Sponsor	<ol style="list-style-type: none">1. To qualify for the RDS Program, a Plan Sponsor:<ol style="list-style-type: none">a. Must meet the Employee Retirement Income Security Act (ERISA) definition of a Plan Sponsor.b. Must not be on the General Services Administration (GSA) Debarment List or the Office of the Inspector General (OIG) Exclusion List.2. An organization is referred to as a Plan Sponsor after they have applied and been approved for the RDS Program.	[Enter your notes here]
Starting an RDS Application early	<ol style="list-style-type: none">1. The RDS Community Information Group (CIG) recommends that Plan Sponsors start preparing to participate in the RDS Program six months to one year before starting an RDS Application for a Plan Year.2. It's important that Plan Sponsors communicate with all parties and that everyone involved understands their role.	[Enter your notes here]
Required and optional user roles	<ol style="list-style-type: none">1. The AM, AR, and Actuary are required user roles.2. Designees and Plan Sponsor Partners are optional user roles.	[Enter your notes here]
Program tools and resources	<ol style="list-style-type: none">1. RDS Secure Website.2. RDS Program Website.3. CMS' RDS Center Help Line.	[Enter your notes here]

Relevant Terms:

Account Manager (AM) - A registered RDS participant, who initiates and manages the Plan Sponsor account, assigns and manages other users, and manages the RDS Application Lifecycle.

Authorized Representative (AR) - A registered RDS participant, who takes legal responsibility for the terms of the RDS Program by signing the Plan Sponsor Agreement, also takes part in other RDS Lifecycle processes.

Actuary - A registered RDS participant, employed by the Plan Sponsor to attest to the RDS Application. The Actuary must be a member of the American Academy of Actuaries that is contracted by the Plan Sponsor to attest to the Medicare Part D equivalence of the Plan Sponsor's Applications' Benefit Options.

Designee - An optional registered RDS participant used to complete tasks in the RDS Program Lifecycle to assist the Account Manager (AM) or the Authorized Representative (AR). The Designee may be assigned multiple privileges to enable specific RDS tasks are performed.

Vendor or Plan Sponsor Partner - A third-party company contracted by a Plan Sponsor to report cost data or manage retiree files.

For more information, refer to the [RDS User Guide](#).